T O U R I S M

VISITOR '87

A TRAVEL SURVEY OF VISITORS TO BRITISH COLUMBIA

VANCOUVER ISLAND TOURISM REGION

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

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VANCOUVER ISLAND TOURISM REGION

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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada
Industrie, Sciences et Technologie Canada

Province of British Columbia
Ministry of Regional Development

Province of British Columbia
Ministry of Tourism and Provincial Secretary

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BRITISH COLUMBIA TOURISM REGIONS
CASSIAR
FORT NELSON
H
Peace River, Alaska Highway
ALASKA
FORT ST. JOHN
DAWSON CREEK
G
North by Northwest
PRINCE RUPERT
QUEEN CHARLOTTE CITY
PRINCE GEORGE
ALBERTA
QUESNEL
F
Cariboo
E
High Country
WILLIAMS LAKE
100 MILE HOUSE
GOLDEN
KAMLOOPS
SALMON ARM
RADIUM HOT SPRINGS
Vancouver Island
PORT HARDY
A
B
Southwestern B.C.
C
Okanagan-Similkameen
VERNON
D
Kootenay Country
NELSON
I
Rocky Mountain
CAMPBELL RIVER
PORT ALBERNI
NANAIMO
VANCOUVER
RICHMOND
PENTICTON
CRANBROOK
VICTORIA
U.S.A.
A Vancouver Island
B Southwestern B.C.
C Okanagan-Similkameen
D Kootenay Country
E High Country
F Cariboo
G North by Northwest
H Peace River, Alaska Highway
I Rocky Mountain

INTRODUCTION

Visitors '87 is a survey of out-of-province visitors to British Columbia conducted during the period of July to October, 1987. It was undertaken to provide a measure of the numbers of people visiting the province during the summer and fall travel period, and to describe the characteristics and profiles of these visitors. It is the first province wide survey of tourists to British Columbia since 1979.

Visitors '87 involved the surveying of travellers arriving in B.C. at major highways, airports and marine terminals. The survey involved "screening" interviews with representatives of 13,743 travel parties entering B.C., or about 1% of total visitor traffic during the survey period. These parties were comprised of 2,940 excursionists (same-day travellers) and 10,803 tourists (one-or-more night travellers) or visitor parties.

Trip diaries were given to 3 out of 4 visitor parties and these travellers were asked to complete the diary on a daily basis and mail it to Survey Headquarters on the completion of their trip. Response rates of 40% were achieved resulting in 3,225 completed diaries representing over 20,000 party-nights spent in British Columbia. One out of four overnighting visitors were asked for their name and phone number, and a detailed follow-up interview was conducted by telephone (for North American visitors) and in airport departure lounges (for overseas visitors). A total of 1,005 of these interviews were completed.

The results of the personal interviews, telephone interviews and diary questionnaires were analysed and the results published in a provincial report entitled Visitors '87. To provide additional details at the regional level, nine separate reports were prepared - one for each tourist region - of which this is one.

HOW TO USE THIS REPORT

This report contains a summary of the most often asked questions about non-resident travel to the region. The tables have been set up to provide a variety of information in a concise, tabular format. In all cases, the formats are similar, with a breakdown of responses into three origin categories, a regional total, and a B.C. total.

The three origin categories of Canada, U.S.A. and International provide a comparison among the residents of these areas, which is intended to guide marketing programs. The regional figures and the B.C. figures allow convenient comparisons between the status of the region and the provincial average.

In all cases percentages have been reported. These percentages are intended to add vertically to 100% (in the case of non-multiple responses). In other words, the distribution of responses in each column can be compared to the percentages in the other columns. For example, the number of nights spent in the region by Canadians can be compared to the number of nights spent by Americans or by residents from offshore countries.

To keep the charts uncongested, the actual counts have not been tabulated. However, the counts (representing the number of parties) can be calculated using the figures provided in this report. The following chart tabulates the number of parties visiting each region from each of the three origin categories. Multiplying the appropriate figure from this chart by any percentage in the same origin category will provide a measure of the actual number of visitor parties.

The reader is cautioned that this chart can be used with all exhibits except those recording accommodation and activities. These are measured in party-nights and the appropriate total counts are tallied as Total Party-Nights (in hundreds).

FACTORS TO CALCULATE
ACTUAL NUMBERS OF TRAVEL PARTIES
FROM PERCENTAGES

(During July-October, 1987)

REGION	CANADA	USA	INT'L	REGION
Vancouver Island	106,000	330,000	48,000	484,000
S.W. B.C.	247,000	407,000	128,000	782,000
Okanagan	116,000	81,000	30,000	227,000
Kootenay Country	37,000	24,000	4,000	65,000
B.C. Rockies	145,000	122,000	23,000	290,000
High Country	111,000	127,000	45,000	283,000
Cariboo	7,000	40,000	10,000	55,000
North by Northwest	16,000	59,000	14,000	89,000
Peace River	9,000	35,000	4,000	48,000
B.C. Total	524,000	855,000	156,000	1,355,000

Visitors '87 has generated a vast amount of information about travel to British Columbia and travel within the region. To assist in the task of analysing the results on a regional basis, a series of the key results have been presented.

The following pages contain: a summary explanation of the regional results; a series of twelve tables describing various features about travel to the region; breakdowns of origins into categories of Canada, U.S.A. and International visitors; a comparison to 1979 results; and a summary of what visitors enjoyed most about the region.

In all the tables, the column percentage is quoted to the nearest whole number. The reader is advised to be cautious in interpreting an undue amount of precision in the numbers as statistical reliability varies for each entry in each table. Regional totals are considered accurate to within 3% to 5%, while individual elements in the exhibits have an error factor in the 5% to 20% range.

The reader is also cautioned to recognize the following points when using the report:

- The units of measurement represent number of parties, unless party-nights are specified;

- The survey was conducted solely of non-B.C. residents, as they entered the province between June 21 and October 31, 1987. This 4+ month period represents approximately 52% of total visitor traffic to B.C.;

- Travel by B.C. residents is not included in this survey. Domestic travel is estimated to represent about 45% of total B.C. tourism;

- Consequently, the survey represents between 25% and 30% of B.C. tourism.

For further information regarding the methodology and results of Visitors '87, please contact:

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HIGHLIGHTS

NON-RESIDENT TOURISM ON VANCOUVER ISLAND

In 1987, there were about 1,690,000 party-nights spent by non B.C. residents to the Vancouver Island tourist region during the period from late June to the end of October. The Vancouver Island region represents approximately 22% of provincial visitors party-nights.

The total number of actual parties visiting Vancouver Island was 484,000 during the four month period with an average length of stay of 3.5 nights.

Americans comprised the largest market share at 68%, followed by Canadians at 22% and international visitors at 10%.

Private automobiles were the preferred mode of transportation for 46% of people touring Vancouver Island. Rented automobiles were a relatively high 28%, while recreational vehicles represented 10% of total visitor traffic.

People came to Vancouver Island mainly to take a touring trip, as reported by seven out of ten travellers. Visiting friends and relatives was the main reason for coming to the Island for one-third of the visitors.

The most common party was two adults travelling together, while the average party size was 2.8.

Most visitors to Vancouver Island had been here before as six out of ten visitors indicated the 1987 visit was not their first trip to the Island. Canadians were the most likely to have visited B.C. previously, while International visitors were the least likely to have been to the province.

Only one-quarter of visitors to Vancouver Island in 1987 had been to Expo 86 in Vancouver. Expo visitation was most common among Canadians at 40%, while just 23% of Americans had visited the fair.

Motels were the most common form of accommodation at 32% of the total party-nights, followed by campgrounds at 21% and the homes of friends and relatives at 19%.

Sightseeing was the most popular activity, participated in during two-thirds of visitor-days, followed by shopping at 44%, visiting gardens and parks, and beach activities at 32%.

Average expenditures totalled $150 per party per day on Vancouver Island. Average expenditure per person based on a party size of 2.76 was $54. The total tourist revenue generated on Vancouver Island during the July through October period in 1987 was $225.7 million, or 25% of the provincial total.

NUMBER OF NIGHTS SPENT ON VANCOUVER ISLAND

NIGHTS	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
1	-	6%	-	4%	11%
2	2%	19	5%	14%	16
3	5	25	9	19	19
4	9	14	7	12	12
5-7	23	21	14	21	19
8-10	24	8	17	12	10
11-15	37	7	43	17	11
16-20	-	-	4	-	-
20 and over	-	-	1	-	-
Row Percentage	22%	68%	10%	100%	100%

- The regional average length of stay was 3.5 nights.
- More than two-thirds (68%) of the total parties were Americans.
- Americans were much more likely to stay in the region for a shorter period of time than Canadians or International visitors, as 50% of Americans stayed less than three nights, while only 7% of Canadians and 14% of International visitors stayed less than three nights.
- Visitors to British Columbia visited an average of 2 regions.

IS B.C. THE MAJOR DESTINATION OF VISITORS TO VANCOUVER ISLAND?

RESPONSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
No	14%	40%	51%	36%	38%
Yes	86	60	49	65	62
Row Percentage	22%	67%	10%	100%	100%

- B.C. was the major destination of two-thirds (65%) of non-resident travellers to Vancouver Island and just slightly less (62%) of all visitors to B.C.
- B.C. was much more likely to be the main destination for Canadians (86%) than for Americans (60%) or International visitors (49%).

METHOD OF TRAVEL TO B.C.
OF VISITORS TO VANCOUVER ISLAND

MODE OF TRANSPORT	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Own Automobile	42%	48%	6%	42%	48%
Rented Automobile	3	15	26	13	8
R.V.	11	9	4	9	14
Bus	3	2	7	3	3
Plane	48	20	62	30	30
Train	-	2	3	1	1
Cruise	1	11	4	8	4
Ferry	8	38	15	29	11
Other	-	1	-	1	1
Row Percentage	21%	68%	10%	136%	100%

- Private automobiles were the preferred mode of transportation to Vancouver Island at 42%, while rented automobiles were a relatively high 13%.
- Three out of ten visitor-parties to Vancouver Island arrived by air. Plane was particularly popular among International visitors (62%) and Canadians (48%).
- Ferries were the method of entry to B.C. by 29% of visitors with over one-third of Americans (38%) entering B.C. by ferry.

METHOD OF TRAVEL IN B.C.
OF VISITORS ON VANCOUVER ISLAND

MODE OF TRANSPORT	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Own Automobile	44%	52%	12%	46%	50%
Rented Automobile	35	23	50	28	20
R.V.	12	10	8	10	15
Bus	14	11	24	13	11
Plane	3	2	2	2	3
Train	1	2	9	2	3
Cruise	1	5	4	4	3
Ferry	51	27	34	33	17
Other	13	8	18	10	13
Row Percentage	24%	67%	10%	149%	133%

- Automobile continued to be the most popular form of transportation on Vancouver Island by visitors, utilized by 74% of visitors. Of this total 46% were personal automobiles and 28% were rented.

- Ferry usage was also a relatively high 33% reflecting the popularity of the Gulf Island ferry routes, and main access routes.

- Bus travel and rented autos were particularly popular by International visitors at 24% and 50% respectively.

MAIN PURPOSE(S) OF TRIP OF VISITORS TO VANCOUVER ISLAND

MAIN TRIP PURPOSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Business	14%	4%	6%	6%	10%
Conference	4	4	5	4	5
Visit Friends/ Relatives	71	20	47	34	38
Touring Trip	50	75	77	70	56
City Trip	11	19	10	16	11
Personal	12	3	5	5	6
Outdoors Trip	17	19	18	18	20
Wilderness/Adventure	4	12	14	10	10
Resort	14	12	11	12	14
Cruise	5	13	4	10	7
Theme Park	4	8	8	7	6
Special Event	3	4	5	4	5
Row Percentage	22%	68%	10%	196%	187%

- The most common purpose of trip was touring, cited by seven out of ten visitors. Touring was particularly important to American and International visitors, mentioned by three-quarters of respondents.

- Next in order of importance was visiting friends and relatives, cited by one-third of visitors to Vancouver Island. Visiting friends and relatives was particularly significant for Canadians, with 71% having this as a main purpose of their trip, while fewer than 20% of Americans fit into this category.

- Also significant to Vancouver Island visitors were Outdoors Trips, City Trips, Visiting a Resort, Cruises and Wilderness/Adventure Trips.

PARTY COMPOSITION OF VISITORS TO VANCOUVER ISLAND

PARTY COMPOSITION	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
1 Adult	18%	6%	8%	7%	12%
2 Adults	50	56	55	56	54
3 Adults	5	7	8	7	6
4 or More Adults	7	14	24	13	10
Adult(s) and 1-2 Ch.	17	16	7	15	15
Adult(s) and 3+ Ch.	2	2	-	2	3
Row Percentage	22%	68%	10%	100%	100%
Average (persons)	2.5	2.8	2.9	2.8	2.64

- Two adults travelling together was the most common party size and composition at 56%.
- Travellers with children comprised a relatively small proportion of the regional total at 17%.
- The average party size was 2.8 persons.

FIRST VISIT TO B.C. BY VISITORS TO VANCOUVER ISLAND

RESPONSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
No	82%	59%	36%	62%	73%
Yes	18	41	64	38	27
Row Percentage	22%	68%	10%	100%	100%

- Slightly over one-third (38%) of all visitors to Vancouver Island were making their first trip to B.C.
- First-time visitors were much more common among Americans (41%) and International visitors (64%) than Canadians (18%).

NUMBER OF TRIPS TO B.C. IN THE PAST THREE YEARS BY VISITORS TO VANCOUVER ISLAND

NO. OF TRIPS	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
None	18%	32%	44%	29%	19%
1	13	20	29	19	15
2	13	19	19	18	21
3	21	17	1	17	15
4-5	9	6	4	7	11
6 or more	25	7	3	12	19
Row Percentage	28%	65%	7%	100%	100%
Average	4.6	2.0	1.0	2.7	3.7

- Visitors to Vancouver Island tend to make frequent trips to B.C. with an average of 2.7 trips over the past three years. Canadians tend to be the most frequent visitors, averaging 4.6 trips over the past three years.

- The regional distribution shows 29% had never visited B.C., while 12% had been to B.C. more than six times in the last three years.

VISITED EXPO 86 BY VISITORS TO VANCOUVER ISLAND

RESPONSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
No	61%	77%	89%	74%	68%
Yes	39	23	11	26	32
Row Percentage	26%	66%	8%	100%	100%

- Nearly three-quarters (74%) of visitors to Vancouver Island had not visited Expo 86.

- Expo 86 visitation was highest among Canadians (39%) followed by Americans (23%) and International visitors (11%).

ACCOMMODATION USED BY VISITORS TO VANCOUVER ISLAND

ACCOMMODATION	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Hotel	13%	18%	10%	16%	16%
Motel	25	35	35	32	24
Campground	19	22	22	21	24
Friends/Relatives	34	9	26	19	26
Resort/Lodge	4	5	1	4	4
Cottage/B & B	3	4	1	3	2
Other	3	8	2	6	4
Row Percentage	30%	59%	11%	100%	100%
Party Nights x (100)	3830	7561	1336	12726	69460

- Most frequently used accommodation by visitors to B.C. were the homes of friends and relatives (26%), motels (24%) and campgrounds (24%).

- The most frequently used accommodation by visitors to Vancouver Island were motels (32%), campgrounds (21%) and the homes of friends and relatives (19%).

- Friends and relatives were particularly popular among Canadian visitors (34%) and International visitors (26%), while less than one in ten Americans used the homes of friends and relatives for accommodation.

ACTIVITIES PURSUED BY VISITORS TO VANCOUVER ISLAND

ACTIVITIES	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Shopping	34%	49%	42%	44%	37%
Tour	7	19	14	15	11
Sightseeing	56	70	60	64	50
Passing Through	15	15	23	16	21
Business	10	3	2	5	8
Outdoor Activities	33	26	27	28	28
Sporting Activities	6	8	10	7	11
Nightlife	8	7	5	7	9
Other Activities	3	3	2	3	4
Beach/Lakeshore	36	28	42	32	27
Museum/Gallery	13	24	13	20	11
Historic Site	14	26	18	21	14
Amusement Park/Fair	3	4	3	4	4
Gardens/Parks	27	40	32	35	25
Friends/Relatives	38	13	25	21	26
Other	3	3	2	3	3
Sporting Event	-	2	1	1	2
Festival	1	2	3	2	3
Cultural Performance	2	2	1	2	3
Other Event	1	1	-	1	1
Row Percentage	29%	60%	11%	331%	298%
Total Party Nights x (100)	3674	7508	1349	12529	69460

- The most popular activities for visitors to Vancouver Island were sightseeing (64%), shopping (44%), gardens/parks (35%), beach activities (32%) and outdoor activities (28%).
- Historic sites and museums/galleries were relatively more popular activities on Vancouver Island than was typical for the province, as was shopping, sightseeing, taking a tour, and visiting a garden or park.
- Activities less popular than the provincial average were passing through, business, sporting activities, and visiting amusement parks.

AVERAGE EXPENDITURES BY VISITORS TO VANCOUVER ISLAND

(PER PARTY PER DAY)

CATEGORY	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Accommodation	$30.38	$47.91	$33.66	$41.37	$37.28
Auto Transportation	14.20	11.12	14.20	12.31	15.19
Other Transportation	9.64	15.96	12.26	13.78	6.48
Package/Cruise	2.74	22.18	16.60	16.13	10.19
Restaurants	22.99	31.78	25.47	28.58	26.75
Groceries	6.90	5.68	7.12	6.17	7.89
Recreation/ Entertainment	4.97	8.68	4.65	7.18	5.26
Shopping/Souvenirs	15.13	25.44	13.78	21.28	18.88
Other	5.57	3.99	3.62	4.39	4.87
Total Expenditure* per party per day	$112.33	$170.66	$130.03	$149.86	$131.88
Party Size	2.5	2.8	2.9	2.8	2.64
Total Expenditure per person per day	$44.93	$60.95	$44.84	$53.52	$49.95

- The average expenditure by visitors to Vancouver Island was $150 per party per day, while the average expenditure per person was $54.
- American visitors tended to spend the most, both per party ($171) and per person ($61).
- Accommodation tended to be the single largest expenditure item ($41) followed by restaurants ($29) and shopping ($21).

* Individual components of the expenditure may not add to the total expenditure figure due to rounding and questionnaire responses recorded to the nearest dollar.

"BEST" ASPECTS OF EACH REGION

RESPONSE	SOUTHWEST B.C.	VANCOUVER ISLAND	OKANAGAN SMILKAMEEN	KOOTENAY COUNTRY	B.C. ROCKIES	HIGH COUNTRY	CARIBOO	NORTH BY N.W.	PEACE RIVER-ALASKA	B.C. TOTAL
Scenery	49%	51%	38%	65%	51%	52%	58%	54%	49%	46%
Mountains	9	6	7	6	16	7	-	15	6	9
Lakes	13	15	19	14	14	14	11	5	8	13
Gardens	9	10	3	2	1	9	-	15	6	5
Fruits	5	6	14	7	-	3	-	-	-	4
Parks	5	8	3	6	11	4	-	4	-	4
Clean	1	1	5	-	2	1	-	10	1	3
Weather	21	28	49	38	30	19	4	7	20	24
Family	13	7	25	43	8	10	4	5	14	15
Friendly	21	23	17	9	24	21	20	33	26	20
Recreation	9	10	22	5	21	5	25	2	12	13
Food	9	9	9	7	7	7	11	16	6	9
Accommodation	9	4	6	9	7	9	-	21	8	8
Shopping	2	3	-	1	5	1	-	21	-	3
Campgrounds	4	4	8	-	15	7	15	4	12	9
Wilderness	3	4	-	-	7	6	11	-	6	4
Outdoors	11	12	5	19	26	9	15	16	-	10
Relaxing	9	8	6	6	5	6	10	3	11	6
Gen. Pretty	12	7	7	6	4	5	8	21	9	6
Gen. Touring	4%	2%	9%	-	4%	2%	11%	9%	-	4%

- Mentioned most often as the "best" aspects of Vancouver Island were the scenery (51%), the weather (28%), friendly people (23%) and the lakes (15%).
- The "best" aspects of British Columbia were generally the same categories, but their overall significance was lower.
- Ranking lower in the opinions of visitors to Vancouver Island than the overall perception of the province were campgrounds, shopping, recreation and general touring.

INTEREST IN VISITING REGIONS BY SEASON

REGION	SEASON			
	SPRING	SUMMER	FALL	WINTER
Southwestern B.C.	34%	68%	36%	22%
Vancouver Island	39	67	35	23
Okanagan Smilkameen	24	82	25	19
Kootenay Country	12	85	3	24
B.C. Rockies	28	83	16	24
High Country	30	79	23	16
Cariboo	12	100	50	18
North by N.W.	15	74	35	9
Peace River-Alaska	55	73	39	23
Total	34%	74%	33%	20%

- Vancouver Island was perceived as an appropriate location to visit in the spring by 4 out of 10 summer visitors.
- Two-thirds of existing visitors would be interested in visiting in the summer and one-third in the fall.
- Winter was seen as a season to visit the Island by 23% of summer visitors.

COMPARISON OF VISITORS TO VANCOUVER ISLAND BETWEEN 1979 AND 1987

ORIGIN	1979		1987	
	VAN. IS.	B.C.	VAN. IS.	B.C.
Alberta	18%	33%	9%	19%
Saskatchewan	4	5	1	3
Manitoba	3	2	2	2
Ontario	8	6	6	7
Quebec	2	1	2	2
Other Canada	1	1	-	1
Total Canada	36	48	20	34
Washington	18	18	13	14
Oregon	7	5	7	6
California	20	11	20	13
Other West. U.S.	6	6	13	12
Other U.S.	8	7	16	12
Total U.S.	59	47	69	57
Europe	5	4	7	7
Asia	1	1	-	1
Australia/N.Z.	1	1	3	2
Other World	1	-	1	1
Total International	8%	6%	11%	11%

- Visitation to Vancouver Island has shifted with a reduced number of Canadians, a corresponding increase in the number of Americans and a slight increase in International visitors.
- Most Canadian provinces declined in market size with Alberta showing the largest decline from 18% to 9%.
- The close-in U.S. markets declined slightly, while the more distant markets increased from 14% to 29%.